

CPARB Expansion Committee
July 7, 2006

Owner Criteria/Guidelines

1) Project Delivery Knowledge and Experience on Owner Team

- Sufficient Construction Management expertise, with commitment to project
- Contract Construction Management staff is acceptable
- Full Time owner staff representing institutional stewardship
- Possibility of several owners, inter-local can draw expertise/experience

2) Owner Representative with Construction Experience

- Including change order management and schedule expertise
- Organizational chart
- Signature Authority

3) Clear and Logical Lines of Authority/Management Plan

- Necessary to properly manage the job
- If public body is using interlocal agreement to contract for CM services, describe agreement provisions, lines of authority, management plan

4) Necessary/Appropriate funding and time to properly manage job and complete the projects itself

- Have appropriate staff and manage the project
- Potential to give Board authority to give conditional approval
- Statute or rules?
- Continuity early and throughout

5) Expectation of Continuity of Owner Team

- What do owners expect of subs and General Contractors?
- There are limitations on who's eligible to bid and then GC/CM puts requirements on the subs
- GC/CM experience requirement of General Conditions issues was to address limiting
- Some subs cannot qualify to bid because of bond requirements and insurance

6) Necessary/Appropriate Construction Budget to Build Project

- Look at owner qualifications
- Note: “construction budget” is intended to describe feasibility of construction budget, not to address whether funding is in place or adequate.

7) Specific to Design Build (Owner Criteria)

- Familiarity with Design and Construction
- Managing design contracts
- Managing construction contracts
- Emphasize importance of program

8) General Discussion about criteria

- Board can use the criteria to evaluate the successful projects
- Legislature – enough or possibly more language
- Manageable and needed for reauthorization
- By adding words, knowledge, experience (ability), it raises the bar
- Define Owner Team
- 3 or 4 of 8 school districts hired CMs for owner representatives

Project Criteria/Guidelines

1) Complex Coordination and/or Scheduling

- Operational and regulatory constraints
- Accelerated Schedule (part of earth procurement)
- Demolition
- Safety
- Security
- Staging of Work/Constrained Physical Site
- Phasing of Construction

2) Occupied (level of occupancy) Buildings/Facilities (More than buildings in some cases)

- Safety/Health Issues
- Security
- Operational and Regulatory Constraints
- Scheduling
- Design Constructability Inputs

3) Complex/Technical Work Environment

- Safety (patient and worker)

- Infection Control (controlling dust, etc...)
- Security (airports and correctional facilities)
- Regulatory Restrictions
- Surroundings
- Site Investigation (for design input)
- On-Site Management
- Protect Owners Assets
- Assured Public Confidence
- Specialty Contractor
- Pre-Qualification
- Historic Preservation Means and Methods Input
- Environmental
- Safety
- Security

5) Contractor Design Involvement

- Scheduling/Phasing
- Untried or untested innovative design
- Owner talking directly to individual that has to make it happen (based on what owner would do on a non-GC/CM baseline):
 - Constructability
 - Value Engineering
 - Budget
- Unique Expertise Required
- Continuous value engineering rather than one time only
- Responsibility of team to implement value engineering ideas
- Collaborative
- Critical (the current language is critical)?
- Actual builders perspective
- Means and methods with design
- Implementation of LEED (choice, availability and where materials come from) requirements (integrated design construction)
- Matching Design to Market
- How is it distinguished from GC/CM or run of the mill project?
- What is most competitive?
 - In Design Bid Build, don't know until you bid

6) Early Procurement/Phasing

- GC/CM assesses these factors
- Beat the market
- Accelerated schedule
- Avoid inflation
- Take advantage of seasonal windows (example: some bid in the fall to get better prices)
- Identify long lead items

- Bidding climate determinations
- Labor availability in tight market
- Purchase unique materials